

Facilitating an Assurance Leadership Forum or Summit Session

The objective of the ALF is to focus on discussion and sharing of knowledge and ideas. This format works because attendees are experienced and have specialist skills. Plus it's intentionally different to other industry events which tend to focus on presentations.

Regular attendees have come to expect this style of session and expect to contribute.

Feedback from attendees over the years continues to praise sessions that include the audience and recognise they have as much to offer as the facilitator.

This guide is provided to help you make your session successful.

Recommended Format

All sessions are 75 minutes long. They are discussion groups. Typical sessions require a 15-20 minute introductory presentation to introduce your topic. (If using slides, between 10-12 is ideal). Conclude your introduction with some specific questions and share our own opinions on the questions posed. Strongly held opinions help to get discussion started.

Sessions are not designed to be a sales opportunity for your tools and services, but by all means mention them during discussion. Anyone interested will approach you during the day.

Other formats of sessions that work well:

- Customer oriented case study of a specific challenge. This is typically a longer element of presentation but please still leave time for discussion or be open for questions during your session.
- Experience of a new technique or lessons you've learned in your team. Typically given by an end user organisation rather than a supplier. Again normally requires a longer element of presentation.
- Debate. Pose a specific statement regarding your topic and have two assistants: one to argue for the proposal and one to argue against it. Involve the attendees and have a show of hands at the end to gauge the attendees' view.
- Gold Fish Bowl. This is a more structured way to run a discussion and is similar to a panel, except the panel members change throughout the discussion. Contact GC for more information on how to run this kind of session.

All these formats have been used successfully at previous Summits and Forums.

The Facilitation Role

You can assume the delegates are intelligent and well informed. Many will be active in the areas you discuss and some may be advanced practitioners and have their own alternative solutions. Your role as facilitator is to pose the questions, encourage and manage the discussion and keep the discussion going.

Try to avoid one person dominating the discussions and encourage those who are quiet to offer their views.

Sometimes, the discussion starts before you finish your introduction. Some topics start up very lively debates. If the conversation is flowing, it's best to manage the discussion, and when there is a pause, continue your introduction. Occasionally, you hit gold and your introduction may never be finished! This at least gives you an excuse to talk to people who showed the greatest interest in the topic.

Treat the Event as Market Research Rather than a Sales Opportunity

We encourage sponsors to treat the sessions as an opportunity to do some market research and learn about the latest challenges and hot-topics.

If you choose a good topic where lots of people have problems and you demonstrate a good knowledge of the problem you will make contact with good, qualified prospects.

PowerPoint Slides and Handouts

At our annual Summit, every delegate gets a handout with summarised session materials. The handout will contain an A4 sheet for every session – 16 sheets in total. These will contain the PPT slides printed six slides per page double-sided, so please adhere to the 12 slide limit if you can or at least put the important stuff on the first 12 slides.

If you have marketing material or other papers you wish to give to the delegates you can do that from your table but there will also be plenty of space to leave materials around the venue.

After the Event

We will ask delegates and facilitators to send us their notes from the session and these will be posted on the ukalf.com website. We would also like to post your PPT slides and any other supporting material you think would be useful.

Leading up to the Event

Before the event, we invite you to register on the ukalf.com site and post a blog entry to provide more information/background to your session. Potentially you will get some discussion on your blog, the conversation can continue during the Forums/Summit and afterwards also.

We typically invite our mailing list to complete an annual survey of favoured topics which drives the programme for the following year. We expect to finalise the programme 2-3 weeks prior to the event, so all you need to do before then is settle on the title and have 100-150 words or so to describe the topic. We'll need the final material 5-7 days before the event.

Guidelines on Facilitation

A good facilitator is someone who is confident about sharing new ideas with others and sensitive enough to listen and draw out the views of all group members.

Facilitation is commonly understood to be less “directive” than presenting or teaching. A useful rule of thumb distinction between facilitation and presenting is that in facilitation, the goal is usually for people to learn something that nobody knows at the beginning, whereas in presenting the goal is usually for people to learn what the presenter already knows.

Facilitation is often described as the art of making things easy for others, but if you make things too easy you risk returning to the spoon-feeding tradition in which delegates passively digest whatever the facilitator wants them to.

In essence, facilitation is an enabling role in which the focus is usually on what the delegates are doing and experiencing, rather than on what the facilitator is doing.

An impartial stance can help to encourage discussion or defuse conflict or help delegates become more independent and responsible in their participation. However, there are some issues that you should not attempt to be neutral such as your own non-negotiable beliefs and views about your selected topic. Then you should be clear about your views for the benefit of others and a full discussion.

You (as a facilitator) first need a reasonably clear picture of what it is that you want to facilitate. There are many options but for the ALF and Summit we suggest group development, or learning climate are the most relevant.

You may have a small group of 15 or a larger group of 40 delegates who have committed their time to listen, learn and participate and this can be achieved in various ways including:

- Taking a case study and encourage discussion (how to achieve, what would they do, why etc)

- Sharing your stance on a topic and open the topic up for discussion (who agrees, who disagrees, why, what would they do differently? etc.)
- Ask lots of questions to encourage participation.
- If all else fails – ‘lob in’ a potentially conflicting opinion to raise the energy of the delegates

Good facilitators are: flexible, adaptive, proactive, responsive and resilient – they are good listeners and articulate and concise.

Good Luck and Enjoy!

If you need any more information, contact Paul Gerrard (paul@gerrardconsulting.com or +44 7940 547894)